



## COVID-19 Vaccine Management System (CVMS) - Provider Portal

### Request Additional Vaccines Through the Marketplace Job Aid

If you need additional COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** in the CVMS Provider Portal to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

Please follow the instructions below to learn:

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Only users with a HEALTHCARE LOCATION MANAGER profile can request doses from other healthcare providers.

#### 1 How to Request Vaccine Surplus from Other Providers

If you need additional COVID-19 vaccine doses, first check if other providers in your area are offering extra doses in the Vaccine Marketplace. If you don’t find any, you can post a request on your own.

1. Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace (highlighted with a red box), Shipments, and More. Below the navigation bar, the user is logged in as RPA Loc 1. The main content area is divided into two sections: 'Recipient Check-In' on the left and 'Today's Appointments' on the right. The 'Recipient Check-In' section contains a text input field for the 'Appointment Confirmation Number' and a 'Go' button. Below this, there is a link for 'No Appointment Confirmation Number?' and a 'Search Appointments' button. The 'Today's Appointments' section features a table with columns for TIME, DETAILS, CASE NUMBER, and LOCATION.



## 2. Change the view to **Seek Transfer Match – Extra (Active)**

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and More. Below the navigation bar, there is a section titled 'You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

A 'New Seek Transfer Match' button is located in the top right corner.

The 'Orders' section shows 'All Imported (VTrcks) Orders' with a dropdown menu. The dropdown menu is open, showing the following options: 'Seek Transfer Match - All', 'Seek Transfer Match - All (Active)', 'Seek Transfer Match - Extra (Active)', and 'Seek Transfer Match - Wanted (Active)'. The 'Seek Transfer Match - Extra (Active)' option is highlighted with a red box.

## 3. Click on **CITY** or **COUNTY** to sort the records in the ascending or descending order by location, and easily spot providers located nearby

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar, there is a section titled 'You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

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Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

A 'New Seek Transfer Match' button is located in the top right corner.

The 'Orders' section shows 'Seek Transfer Match - Extra (Active)' with a dropdown menu. The dropdown menu is open, showing the following options: 'Seek Transfer Match - All', 'Seek Transfer Match - All (Active)', 'Seek Transfer Match - Extra (Active)', and 'Seek Transfer Match - Wanted (Active)'. The 'Seek Transfer Match - Extra (Active)' option is highlighted with a red box.

Below the dropdown menu, there is a table of records. The table has columns for Order Number, Account Name, County, City, Product, Brand, Dosage, Expiration Date, Created Date, Last Modified Date, Status, and Request Type. The table is sorted by City in ascending order. The first three records are:

	Order Number	Account Name	County	City	Product	Brand	Dosage	Expiration Date	Created Date	Last Modified Date	Status	Request Type
1	ORD-0017342	Training Team V...	Wake	Raleigh	Pfizer-BioNTech...	Pfizer	300	1/1/2022	6/9/2021, 10:59...	6/9/2021, 10:59...	Acti...	Extra (to Send O...
2	ORD-0017260	DoNotUse - QA...			Moderna (14 do...	moderna	10	12/31/2021	6/2/2021, 9:46 ...	6/2/2021, 9:46 ...	Acti...	Extra (to Send O...
3	ORD-0017257	DoNotUse - QA...			Moderna (14 do...	moderna	10	12/31/2021	6/2/2021, 9:35 ...	6/2/2021, 9:35 ...	Acti...	Extra (to Send O...



4. Select the Request that Match Your Offer by clicking on the **ORDER NUMBER**

Orders								
Seek Transfer Match - Extra (Active)								
3 items • Sorted by City • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago								
	<input type="checkbox"/> Order Number	<input type="checkbox"/> Account Name	<input type="checkbox"/> Cou...	<input type="checkbox"/> City	<input type="checkbox"/> Product	<input type="checkbox"/> Brand	<input type="checkbox"/> Dos...	<input type="checkbox"/> Exp
1	<input checked="" type="checkbox"/> ORD-0017342	Training Team V...	Wake	Raleigh	Pfizer-BioNTech...		300	1/1
2	<input type="checkbox"/> ORD-0017260	DoNotUse - QA...			Moderna (14 do...	moderna	10	12/
3	<input type="checkbox"/> ORD-0017257	DoNotUse - QA...			Moderna (14 do...	moderna	10	12/

5. Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Order

ORD-0017342

Edit

Clone

Account Name

Training Team Vaccine Provider - Site 1

Status

Active

Manufacturer

Doses (Number)

300

Order Start Date

6/9/2021

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.

2. Monitor the Vaccine Marketplace to identify a 'match' for your need.

3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.

4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>

5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type

Extra (to Send Outbound)

Order Start Date

6/9/2021

Account Name

Training Team Vaccine Provider - Site 1

Status

Active

Doses (Number)

300

Status Indicator

County

Wake

HCP Contact Name

Ernest Celestine

City

Raleigh

HCP Contact Phone

222-333-4444

Additional Comments (Optional)

HCP Contact Email

ernest.celestine@test.test

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

[Lot 1234567 - exp 1/1/2022](#)

Vaccine Product to Transfer

Pfizer-BioNTech (6 doses/Vial) (195 MDV) COVID-19 Vaccine

Lot Transferred

1234567

Expiration Date

1/1/2022

Doses Per Vial (Number)

6

Additional Details if Wanted (To Receive Inbound)

Manufacturer

Sending Location Parent Account (Org)

Training Team Vaccine Provider

Brand

Read the general instructions

Read the details provided by the other provider

Contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**



- If you both agree on the conditions of transfer, the sending provider will create a transfer in the CVMS Provider Portal. Once the transferred inventory is delivered, add the inventory in the CVMS Provider Portal by **receiving an Inbound Transfer** (see the second section of this document for detailed instructions).

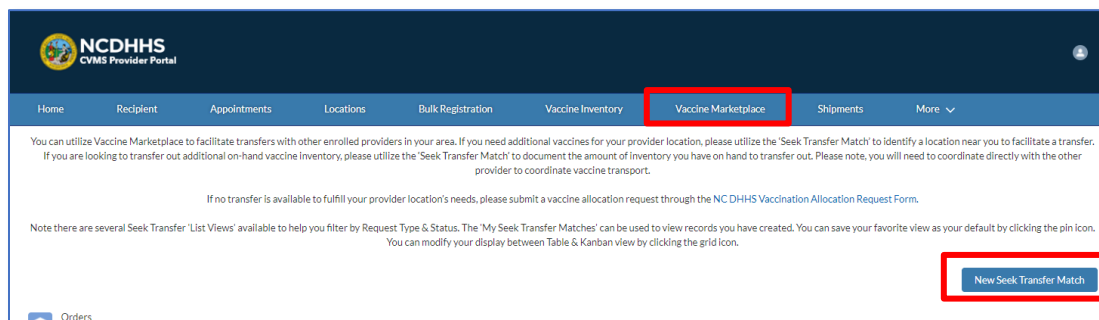
Note: You can check the **NCDHHS guidance for transport of COVID-19 vaccine** at <https://covid19.ncdhhs.gov/media/3070/download?attachment>.

**OR**

- If no provider is offering the type of COVID-19 vaccine product you are seeking, post a **WANTED** request in the Vaccine Marketplace to let other providers know that you can are seeking additional COVID-19 vaccine doses.

## 2 How to Post a “Wanted” Request in the Vaccine Marketplace

- Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal
- Click on **NEW SEEK TRANSFER MATCH**



- Complete the New Order: Seek Transfer Match form with the following details:

**New Order: Seek Transfer Match**

**COVID-19 Vaccine Seek Transfer Match Instructions**

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

- Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
- Monitor the Vaccine Marketplace to identify a 'match' for your need.
- Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
- The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
- The State will review and approve the transfer request if it meets all requirements.

**Doses per Vial Reminder**

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

**Seek Transfer Match Details**

* Request Type Wanted (to Receive Inbound)	* Order Start Date 6/9/2021
* Account Name Training Team Vaccine Provider - Sit...	* Status Active
* Doses (Number) 300	* HCP Contact Name Ernest Celestine
Additional Comments (Optional)	* HCP Contact Phone 111-333-4444

- **Read the instructions** at the top of window
- **Request Type:** select “Wanted (to Receive Inbound)”
- **Order Start Date:** enter today’s date
- **Account Name:** select your location account name
- **Status:** select **ACTIVE**
- **Doses:** enter the number of doses you are looking for
- **HCP Contact Name/phone/email:** who to contact to agree on the transfer
- **Additional Comments:** enter any information that could be useful like the address of shipment, and opening hours to receive the shipment



Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

Search Vaccine Inventories...

Additional Details if Wanted (To Receive Inbound)

Manufacturer  
Janssen (J&J)

Requesting Provider to check box below to confirm adherence to each req...

Adherence to all Requirements ☒

Requirement 1 (Seek Transfer Match)  
Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport: <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)  
All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

System Information

Order Record Type: Seek Transfer Match  
Order Owner: Simon Couderc

Cancel Save & New Save

- **Manufacturer:** select the COVID-19 vaccine brand you are seeking, or select **ANY** if any brand is acceptable
- **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

- Click **SAVE**

4. If you reach agreement with a provider on the conditions of transfer, the sending provider will enter a transfer in the CVMS Provider Portal. Once the inventory is delivered, you can **receive the Inbound Transfer to add the inventory to your location.**

Note: You can check the **NCDHHS guidance for transport of COVID-19 vaccine** at <https://covid19.ncdhhs.gov/media/3070/download?attachment>.

### 3 How to Add to your Inventory the Transferred Vaccine

1. Once the sending provider has initiated the transfer and you receive the transfer, navigate to the **VACCINE INVENTORY** tab in the CVMS Provider Portal and click the **INBOUND TRANSFER** button

NCDHHS  
CVMS Provider Portal

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More

Scan or type a barcode Add Waste Insufficient Quantity Inbound Transfer Outbound Transfer

Vaccine Inventories  
All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

	Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage ...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete		1/15/202...



2. Select the transferred inventory from the list and click **NEXT**

Home Recipient Bulk Registration Vaccine Inventory Shipments Help & Information

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

Vaccine Inventory Name	Product ID	Account Name	Status	Incoming Transfer Doses	Serial Number
<input type="radio"/> Delivery 12/19/2020	Pfizer-BioNTech (195 MDV) COVI...	Quality Hospital (Location 1)	Incoming Transfer in Transit	100	

Next

3. Enter the Date Received and Doses Received and click **NEXT**

Home Recipient Bulk Registration Vaccine Inventory Shipments Help & Information

Previous

Name: Delivery 12/19/2020

Product Name: Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

NDC #:

Lot: 123456745

Expiration Date: 12/19/2021, 12:00 PM

Serial Number:

Account: Quality Hospital (Location 1)

\* Date Received  
Dec 21, 2020

\* Doses Received  
100

Incoming Doses Quantity: 100

Previous Next

4. Click **FINISH**

Home Recipient Bulk Registration Vaccine Inventory Shipments Help & Information

Previous

Record has been saved successfully.

Previous Finish



## 4 How to Maintain your "Wanted" Request Posted in the Vaccine Marketplace

After 7 days, your post in the Vaccine Marketplace will expire. You can extend or close your post prior the seven days. After seven days, you can clone your form and post a new one with the same information.

The screenshot shows the NCDHHS CVMS Provider Portal. The 'Vaccine Marketplace' tab is highlighted in the top navigation bar. Below the navigation bar, there is a section titled 'My Seek Transfer Matches' with a search bar and a table of matches. The table has columns for Order Number, Request Type, Status, St., Act., Co., City, Pr., Brand, D., Cre., and Lst. The first match is highlighted with a red box.

Order Number	Request Type	Status	St.	Act.	Co.	City	Pr.	Brand	D.	Cre.	Lst.
ORD-0017311	Extra (to Se...	Auto-Lapsed (Old)		Tr...	Wa...	Ral...	P...	30	6/7...	6/7...	
ORD-0017315	Wanted (to ...	Auto-Lapsed (Old)		Tr...	Wa...	Ral...	P...	30	6/7...	6/7...	
ORD-0017341	Wanted (to ...	Closed/Inactive		Tr...	Wa...	Ral...	M...	100	6/9...	6/9...	
ORD-0017342	Extra (to Se...	Active		Tr...	Wa...	Ral...	P...	300	6/9...	6/9...	
ORD-0017343	Wanted (to ...	Active		Tr...	Wa...	Ral...	Ja...	300	6/9...	6/9...	

1. Navigate to the **VACCINE MARKETPLACE** tab in the CVMS Provider Portal

2. Change the view to **MY SEEK TRANSFER MATCHES**

3. Open the request you wish to extend, close, or clone

### 4.1 Extend or Close your Post (if not expired)

The screenshot shows the details of a specific request (ORD-0017342) in the NCDHHS CVMS Provider Portal. The 'Edit' button is highlighted with a red box. Below the 'Edit' button, there is a section titled 'COVID-19 Vaccine Seek Transfer Match Instructions' and a section titled 'Seek Transfer Match Details'.

**Order**  
ORD-0017342

Account Name: Training Team Vaccine Provider - Site 1  
Status: Active  
Manufacturer:   
Doses (Number): 300  
Order Start Date: 6/9/2021

**DETAILS** RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

**Seek Transfer Match Details**

Request Type	Extra (to Send Outbound)	Order Start Date	6/9/2021
Account Name	Training Team Vaccine Provider - Site 1	Status	Active
Doses (Number)		Status Indicator	

4. Click on **EDIT** at the top right corner of the screen

5. To Extend the request: update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down

6. To Close the request: update the **STATUS** to Close/Inactive

7. Click **SAVE**





## 4.2 Clone your Post (if expired or closed)

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top right, there is a 'Clone' button highlighted with a red box. Below the navigation bar, the 'Order ORD-007314' is displayed. The 'DETAILS' tab is selected, showing 'COVID-19 Vaccine Seek Transfer Match Instructions'. Under the 'Seek Transfer Match Details' section, the 'Order Start Date' is set to 6/7/2021 and the 'Status Indicator' is highlighted with a red box.

4. Click on **CLONE** at the top right corner of the screen

5. Update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down

6. Update the Status to **ACTIVE**

7. Update any other fields if necessary

8. Click **SAVE**

## 4.3 Submit a Request for COVID-19 Vaccine to the NCDHHS Team

You can submit a request for COVID-19 vaccine to NCDHHS via the NCDHHS Vaccine Allocation Form at <https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#>. A link to the form was also added to the **VACCINE MARKETPLACE** tab.

1. Navigate to **VACCINE MARKETPLACE** in the CVMS Provider Portal
2. Click the **NCDHHS VACCINATION ALLOCATION REQUEST FORM** link

The screenshot shows the NCDHHS CVMS Provider Portal interface. The 'Vaccine Marketplace' tab is highlighted with a red box. Below the navigation bar, there is a link to the 'NCDHHS Vaccination Allocation Request Form' highlighted with a red box.

3. Fill out the form and submit it

The screenshot shows the 'Allocation Request Form' - Page 1 of 3. It includes fields for 'Parent Organization', 'Provider Location Name', 'Provider Contact Name', 'Provider Contact Email', and 'Provider Contact Phone Number'.

The screenshot shows the 'Allocation Request Form' - Page 2 of 3. It includes fields for 'Please request vaccine doses below (inclusive of first and second doses)', 'Please request the number of Pfizer doses your provider location would like below (inclusive of first and second doses)', 'Please request the number of Moderna doses your provider location would like below (inclusive of first and second doses)', 'Please request the number of Janssen doses your provider location would like below (inclusive of first and second doses)', and 'Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the name of the on-site coordinator to assist with the transfer:'.

The screenshot shows the 'Allocation Request Form' - Page 3 of 3. It includes fields for 'Recorded Doses and Attestation', 'Please estimate the number of administered vaccinations that have not yet been recorded in CVMS:', and 'By clicking this box, I affirm that I have reviewed the list of providers in my area with on-hand inventory and that these providers do not have inventory that cover my need:'.





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If you have any questions or issues, please go to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine) and select the "**Vaccine Provider**" option to submit your question or issue.

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 a.m. – 7 p.m. ET

Saturday & Sunday: 10 a.m. – 6 p.m. ET

*Version 1 – June 9, 2021*